



Filing ID #10021525

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Tabitha Kay Isner  
**Status:** Congressional Candidate  
**State/District:** AL02

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2018  
**Filing Date:** 05/3/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
College Counts 529 ⇒ Vanguard 500 Index [MF]		\$1,001 - \$15,000	Tax-Deferred		
Family Checking [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	Not Applicable
MN State Retirement Health Care Savings Plan ⇒ US Stock Index Fund [MF]		\$1,001 - \$15,000	Tax-Deferred		
Pension Fund BAA [OT]		\$50,001 - \$100,000	Interest	\$5,001 - \$15,000	\$1,001 - \$2,500
DESCRIPTION: An account through the Christian Church Pension Fund, available to members, for the purpose of accumulating savings.					
Pension Fund Pension [DB]		Undetermined	None		
TIAA-CREF IRA ⇒ TIAA-CREF S&P 500 Index Fund- Retirement Class [MF]		\$15,001 - \$50,000	Tax-Deferred		
Ubiquity 401k ⇒ Vanguard Total Stock Market ETF (VTI) [MF]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
USAA IRA ⇒ USAA S&P 500 Index Fund Member Shares [MF]		\$15,001 - \$50,000	Tax-Deferred		

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
First Christian Church of Montgomery, AL	Spouse Salary	\$30,702.00	\$73,684.00
New World Now	Salary	\$25,971.00	\$93,374.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Navient	December 2006	Student Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Policy Specialist	Minnesota Depart of Human Services
COMMENTS: Primary occupation until moving out of state	

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

Source (Name and Address)	Brief Description of Duties
First Children's Finance (Minneapolis, MN, US)	Consulting Services in 2016
COMMENTS: Wrote a report for the organization to help supplement family income during out-of-state move and in-between permanent employment.	
Voices for Alabama Children (Montgomery, AL, US)	Consulting Services in 2016

Source (Name and Address)	Brief Description of Duties
COMMENTS: Wrote a report for the organization to help supplement family income during out-of-state move and in-between permanent employment.	

## SCHEDULE A ASSET CLASS DETAILS

- College Counts 529  
LOCATION: AL
- MN State Retirement Health Care Savings Plan  
LOCATION: US
- TIAA-CREF IRA
- Ubiquity 401k
- USAA IRA

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## COMMENTS

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Tabitha Kay Isner , 05/3/2018